



Minutes of the Meeting held on
Thursday, March 22, 2018

Chapter Board Attendees:

Leo Dan Perez, Chapter President - CEO of SFCU
Isabel Garcia, Chapter Vice President - Collections Manager of Valley Federal CU
Rosa Hill, Chapter Treasurer - VP of Lending of RGVCU
Monica Mendoza, Chapter Secretary - CHRO of SFCU

Chapter Liaison Attendees:

Grace Mann, COO of SFCU
Rene De La Garza, CLO of SFCU
Josue Elizondo, IT Programmer, SFCU

Meeting Sponsor:

Bill Dunford, Sales
Servion Mortgage

Guest Speaker/Presenter:

James Green, CBCP, CUERME
Senior Consulting Manager
Strategic BCP
813-476-5723 Direct
jgreen@strategicbcp.com

Attendees:

Meeting Sign-In Sheets Attached – 12 pages

Meeting Location:

Security First Credit Union – Training Room
3515 S. Jackson Rd.
Edinburg, TX 78539

This meeting was called to order at 6:30 p.m.

Ms. Isabel Garcia led group in Pledge of Allegiance.

Ms. Monica Mendoza greeted the attendees and announced that meeting minutes from the March 1, 2018 meeting were posted on the Magic Valley Website. Ms. Mendoza reminded everyone to visit the website for the schedule of meetings and to register.

Ms. Rosa Hill presented the Treasurer's Report. The opening balance as of March 1, 2018 was \$8,159.98. \$0 collected from sponsors. \$625 collected from credit union attendees for the March 1st meeting. \$219 raised for the CAT PAC - \$150 from the live auction of a wine gift basket donated by Monica Mendoza of Security First Credit Union and \$69 from the 50/50 prize drawing. The highest bidder for the wine basket was Gerardo Rivera from Laredo FCU. \$100 donated by Security First for 4 (four) \$25 gift cards to raffle to meeting attendees. The closing balance as of March 20, 2018 was \$8,181.65

Mr. Dan Perez welcomed everyone and introduced the evening's guest speaker, Mr. James Green. Mr. Green presented on the topic of "Active Shooters In the Workplace". Mr. Green provided strategies for preparing and responding to an active shooter incident. The focus of the presentation centered around the Department of Homeland Security's recommendation of **RUN, HIDE, FIGHT**.

Ms. Monica Mendoza announced the idea for creating a Magic Valley Chapter training for Active Shooters In the Workplace to be shared with all local area credit unions. Ms. Mendoza requested one volunteer from each MVC credit union to participate in creating this training.

Mrs. Grace Mann covered CAT PAC News which announced the fundraising goal of \$3,000 for 2018. Mrs. Mann pointed out the new "fundraising thermometer" on the Magic Valley Website to keep track of the Chapter's progress.

Door prizes announcement, 50/50 drawing, and auction bidding for the CAT PAC took place. Mr. Gerardo Rivera from Laredo FCU won \$150 in the 50/50 drawing. Mr. Dan Perez from Security First FCU was the highest bidder for the Vera Wang cross-body bag donated by Quips & Quotes in McAllen.

With no further business to be addressed, this meeting adjourned at 8:15 p.m. by Mrs. Grace Mann.

Sign-In Sheet

Meeting Date: Thursday, March 22, 2018

Place: SFCU Edinburg Branch

Magic Valley



Chapter of Credit Unions

Name:	Maria E. Awarado (Mary)
Credit Union:	Brownsville City Emp FCU
Position:	Fiscal Tech I
Contact #:	(956) 548-6041
<i>Paid (cash/credit card, invoice):</i>	OK. #129393

Name:	Elias Vasquez Jr
Credit Union:	Security First Credit Union
Position:	B2 Manager
Contact #:	956-778-1805
<i>Paid (cash/credit card, invoice):</i>	Invoice

Name:	Cynthia Tamayo
Credit Union:	Navy Army CCU
Position:	MSR
Contact #:	(956) 266-4126
<i>Paid (cash/credit card, invoice):</i>	Thelma - Invoice. pd.

Name:	
Credit Union:	
Position:	
Contact #:	
<i>Paid (cash/credit card, invoice):</i>	

Sign-In Sheet

Meeting Date: Thursday, March 22, 2018

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Magic Valley



Chapter of Credit Unions

Name:	Monica Peña
Credit Union:	Security First CU
Position:	Lending System Analyst / Trainer
Contact #:	956-661-4000 ext 1000
<i>Paid (cash/credit card, invoice):</i>	INVOICE

Name:	
Credit Union:	
Position:	
Contact #:	
<i>Paid (cash/credit card, invoice):</i>	

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Credit Union:	
Position:	
Contact #:	
<i>Paid (cash/credit card, invoice):</i>	

Name:	
Credit Union:	
Position:	
Contact #:	
<i>Paid (cash/credit card, invoice):</i>	

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Magic Valley



Chapter of Credit Unions

Name:	Belinda Garza
Credit Union:	SFCU
Position:	Collections Manager
Contact #:	956-289-6505
<i>Paid (cash/credit card, invoice):</i>	Invoice

Name:	Bill Dunford
Credit Union:	Servion Mortgage
Position:	AE President
Contact #:	405-888-6395
<i>Paid (cash/credit card, invoice):</i>	

Name:	Erasmus Ramos
Credit Union:	Laredo FCU
Position:	Prog. Inst CEO
Contact #:	956-767-4001
<i>Paid (cash/credit card, invoice):</i>	ch. 37881

Name:	Emabel Ramirez
Credit Union:	Navy Army CU
Position:	Mortgage Loan or IT
Contact #:	956 888 2466
<i>Paid (cash/credit card, invoice):</i>	Thelma - Invoice PA.

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Name:	Isabel Garcia
Credit Union:	VFCU
Position:	Collections Manager
Contact #:	956 421 3699
<i>Paid (cash/credit card, invoice):</i>	CR # 422487

Name:	Leo Salinas
Credit Union:	Greater Texas CU
Position:	Triller Supervisor
Contact #:	956-316-8334
<i>Paid (cash/credit card, invoice):</i>	Paid CR # 12973

Name:	Honora Mirales
Credit Union:	Security First
Position:	Branch Mgr
Contact #:	(956) 354-7880
<i>Paid (cash/credit card, invoice):</i>	Invoice

Name:	Alyssa Potter
Credit Union:	Navy Army CCU
Position:	MSD
Contact #:	361-986-4500
<i>Paid (cash/credit card, invoice):</i>	Thelma - Invoice PA

Sign-In Sheet

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Chapter of Credit Unions

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Name:	Shaun Dawson
Credit Union:	Greater Texas Credit Union
Position:	Member Services Supervisor
Contact #:	956-316-8334
<i>Paid (cash/credit card, invoice):</i>	CU # 12923

Name:	Thelma Aguilar
Credit Union:	Navy Army CU
Position:	MSR
Contact #:	956-205-4700 (ext 11604)
<i>Paid (cash/credit card, invoice):</i>	Thelma - Invoice Pd.

Name:	Blanca Garcia
Credit Union:	Security First C.U.
Position:	Branch Manager
Contact #:	956-661-4000
<i>Paid (cash/credit card, invoice):</i>	INVOICE

Name:	Josue Elizondo
Credit Union:	Security First CU
Position:	IT Programmer
Contact #:	(956) 661-4000 ext 1248
<i>Paid (cash/credit card, invoice):</i>	Pd. cash.

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Chapter of Credit Unions

Name:	Susann Rohn
Credit Union:	Greater Texas CU
Position:	Manager
Contact #:	956-292-3424
<i>Paid (cash/credit card, invoice):</i>	CL #12923

Name:	Lupita Peralez
Credit Union:	NACCU
Position:	MSO
Contact #:	956-648-3839
<i>Paid (cash/credit card, invoice):</i>	Thelma - Invoice Pd.

Name:	Ana Villanueva
Credit Union:	Security First Credit Union
Position:	Branch Manager
Contact #:	956-661-4006
<i>Paid (cash/credit card, invoice):</i>	Invoice

Name:	Jessica Carracho
Credit Union:	Plains Capital Bank
Position:	Risk Analyst
Contact #:	956-802-7002
<i>Paid (cash/credit card, invoice):</i>	

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Chapter of Credit Unions

Name:	Leoberto Restrepo
Credit Union:	South Texas FCU
Position:	CEO
Contact #:	956 618 7500
<i>Paid (cash/credit card, invoice):</i>	CR 506105

Name:	GERARDO PAZ
Credit Union:	SOUTH TEXAS FCU
Position:	COMPLIANCE
Contact #:	956 618 7500 EXT 7533
<i>Paid (cash/credit card, invoice):</i>	CIC# 506105

Name:	Sonyia Rodriguez
Credit Union:	Valley Federal Credit Union
Position:	Loan Officer
Contact #:	956-425-5668
<i>Paid (cash/credit card, invoice):</i>	CR.#423488

Name:	Giovanni Mendez
Credit Union:	VFCU
Position:	Head Teller
Contact #:	956-559-1415
<i>Paid (cash/credit card, invoice):</i>	CR.#423488

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Chapter of Credit Unions

Name:	MONICA Mendez
Credit Union:	SFCU
Position:	HR Mgr
Contact #:	9562791771
<i>Paid (cash/credit card, invoice):</i>	Invoice

Name:	Grace Mann
Credit Union:	SFCU
Position:	CUD
Contact #:	
<i>Paid (cash/credit card, invoice):</i>	INVOICE

Name:	Ariana Sanchez
Credit Union:	Valley federal Credit Union
Position:	Head Teller
Contact #:	(956) 792-0111
<i>Paid (cash/credit card, invoice):</i>	CK # 423488

Name:	Jeanette Rodriguez
Credit Union:	VFCU
Position:	teller
Contact #:	956 341-6786
<i>Paid (cash/credit card, invoice):</i>	CK # 423488

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Chapter of Credit Unions

Name:	Mike Grab
Credit Union:	Navy Army CCU.
Position:	Advisory Director.
Contact #:	210-346-9493
<i>Paid (cash/credit card, invoice):</i>	By MACCA - INVOICE Pd.

Name:	Al Chavez
Credit Union:	Laredo Fed. Credit Union
Position:	Manager
Contact #:	956-764-4034
<i>Paid (cash/credit card, invoice):</i>	CL 37881

Name:	James Green
Credit Union:	—
Position:	Presenter.
Contact #:	813-478-5723
<i>Paid (cash/credit card, invoice):</i>	

Name:	Claudia Lozano
Credit Union:	VFCU
Position:	FA
Contact #:	9565463108
<i>Paid (cash/credit card, invoice):</i>	CHK # 423488

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Name:	Paul Wiles
Credit Union:	Security First
Position:	Loan Manager
Contact #:	956-530-7444
<i>Paid (cash/credit card, invoice):</i>	INVOICE

Name:	Gerardo Rivera
Credit Union:	Laredo Federal Credit Union
Position:	Account Mgr.
Contact #:	956-324-7522
<i>Paid (cash/credit card, invoice):</i>	CU 37881

Name:	Cecilia Carmona
Credit Union:	Security First CU
Position:	IT Coordinator / Trainer
Contact #:	956-661-4000 ext 4403
<i>Paid (cash/credit card, invoice):</i>	INVOICE

Name:	Marisa Morales
Credit Union:	Security First Credit Union
Position:	Branch Manager
Contact #:	956-661-4000 x1218
<i>Paid (cash/credit card, invoice):</i>	INVOICE

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Chapter of Credit Unions

Name:	Mary Carpenter
Credit Union:	Security First FCU
Position:	Compliance Officer
Contact #:	956-661-4014
<i>Paid (cash/credit card, invoice):</i>	Invoice

Name:	Rosa Hill
Credit Union:	RVCCU
Position:	VP Lending
Contact #:	956-423-5792
<i>Paid (cash/credit card, invoice):</i>	Pd. ck. 083184

Name:	Letty Lopez
Credit Union:	SFCU
Position:	Loan Admin Manager
Contact #:	956-661-4000 K1129
<i>Paid (cash/credit card, invoice):</i>	Invoice

Name:	Rene De la Sazza
Credit Union:	SFCU
Position:	Chief Lending OP
Contact #:	956-661-4000 X 206
<i>Paid (cash/credit card, invoice):</i>	Invoice

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Chapter of Credit Unions

Name:	SUSAN LANDEZ
Credit Union:	SFCU
Position:	CALL CENTER MGR.
Contact #:	(956) 821-2229
<i>Paid (cash/credit card, invoice):</i>	INVOICE

Name:	Kelli Hensley
Credit Union:	SFCU
Position:	Regional Ops Manager
Contact #:	956-330-4268
<i>Paid (cash/credit card, invoice):</i>	INVOICE

Name:	DAN PEREZ
Credit Union:	SFCU
Position:	PRES/CEO
Contact #:	956-975-6967
<i>Paid (cash/credit card, invoice):</i>	INVOICE

Name:	Melissa Taylor
Credit Union:	SFCU
Position:	Training Coo
Contact #:	956-627-9834
<i>Paid (cash/credit card, invoice):</i>	INVOICE